



Business Plan 2015-20 Revised May 2015

The Company

- Inverness City Heritage Trust a company limited by guarantee – Scottish Company No. 269410. It does not have a share capital.
- The Trust is recognised as a Scottish Charity No: SC036461 and operates on a not for profit basis.
- The Trust is not VAT registered.
- The Trust is an independent organisation that seeks to promote Inverness's cultural heritage and historic environment.
- The objects for which the Trust is established are to promote and encourage, either on its own or in conjunction with others, the conservation, protection and enhancement of the historic, architectural and landscape heritage within Inverness and its environs by any means all for the benefit of the general public now and in the future.
- The Trust aims to develop and provide an effective service and will continue to explore opportunities for partnership with other organisations for capital and revenue funding.
- The Trust has confirmed funding from Historic Scotland until 31 March 2020.

A vision for Inverness's historic environment

- Inverness is the hub of the Scottish Highlands, an area renowned for its spectacular landscape, proud history and vibrant culture.
- Inverness city centre is located on the banks of the River Ness and provides retail, business, education, residential and entertainment facilities for its residents and the wider Highland community.
- The Trust is currently confined for grant purposes to working within the boundaries of Inverness Riverside and Crown conservation areas.
- Inverness Riverside conservation area covers the majority of the city centre and areas of residential property stretching from Friars Bridge in the North to the Ness Islands in the South. The conservation area includes many archaeological sites including the Castle Motte and areas of designed landscape such as the Ness Islands. The Crown conservation area covers the residential area of villas and terraces to the south west of the city centre. A map showing the extent of the two conservation areas is attached as Appendix A.
- The Trust's vision for Inverness's historic environment is that it should be more widely understood and accessible for residents and visitors, sustained in a good state of repair and used as a catalyst for environmental, cultural, economic and social change for the better for all that live in or visit Inverness.
- With funding and resources secured until 2020, Inverness City Heritage Trust may consider extending the grant eligible area, in recognition of new regeneration-based priorities.

Strategic Objectives

The role of the Inverness City Heritage Trust will be to:

- safeguard and enhance the quality and condition of the Inverness conservation areas, the wider historic environment and the sense of place
- promote wider understanding, enjoyment and appreciation of Inverness's historic environment
- work with others to amplify the impact of wider initiatives to improve the City and make Inverness a better place to live, visit and invest
- be open, transparent, effective and efficient in its work

Governance

- The Trust was formally incorporated on 16 June 2004 as a Company Limited by Guarantee and was launched on 13 May 2005
- The Highland Council has appointed a project officer and seconded her to the Trust
- 10 Directors of the Trust have been formally appointed to the board of the Trust and the assistance of one professional advisor from The Highland Council has been secured
- The Directors have appointed a company secretary, solicitors and accountants for the Company
- Bank accounts have been opened for the Trust and are fully operational.
- Offices have been established in the Town House, High Street, Inverness

Achievements

- Up to March 2015 the Trust awarded grants totalling over £2.65 Million to around 200 projects in the Inverness Riverside and Crown Conservation Areas
- This represents a significant investment in the historic environment of Inverness and has acted as a catalyst to the regeneration of the town centre
- The Trust is a key partner in the application by Highland Council for a TH scheme in the Academy Street area of the city, with the Trust commissioning an area appraisal which formed the basis of the application
- The Trust is a key partner in several strategic projects within Inverness, including the comprehensive repair and restoration of 58-64 Academy Street...
- A baseline study of the conservation area (map attached as Appendix A) has been completed and in 2015 a Conservation Area Management Plan for the Old Town area of the City Centre has been prepared (with input from the Trust) by consultants
- The Trust has established good partnership working with a number of like-minded organisations within Inverness, to the benefit of mutual strategic objectives
- The Trust has established a profile within Inverness as a source of advice and funding for historic buildings
- The Trust's grant assisted projects have helped to keep alive and raise awareness of traditional building skills and materials amongst local contractors and property owners

- The Trust has worked with Historic Scotland, Inverness College (UHI), the National Trust for Scotland, Architectural Heritage Society of Scotland, Inverness Architectural Association and the Construction Industry Training Board (CITB) to deliver the 2015 Architectural Conservation Master Class seminar

Programme of work

The Trust works within the following strategic objectives:

(1) work to safeguard and enhance the quality and condition of Inverness's historic environment by:

- a system of grants established in April 2005 has allocated over £2.65 Million (March 2015) and will continue to grant aid priority projects in Inverness, with a new emphasis which gives priority to projects which demonstrate regeneration;
- attracting additional investment in the Inverness's historic environment from a wide range of other local and national sources;
- promoting ongoing care and maintenance of the historic buildings and archaeological sites in Inverness; and
- promoting the highest standards of new development in the City through our involvement with the Inverness Design Review Panel (formerly PLACE)

(2) promote wider understanding, enjoyment and appreciation of Inverness' historic environment by:

- publishing information about Inverness's historic environment and cultural heritage and maintain a website;
- inspiring learning through encouraging contact with, and interpretation of, the City's historic environment and cultural heritage;
- helping with the organisation of the annual Doors Open Day event in Inverness in liaison with The Highland Council as part of their Highland Doors Open Day; and
- raising the profile and increasing understanding of Inverness's historic environment through the media

(3) work with others to amplify the impact of wider initiatives to improve the city and make Inverness a better place to live, visit and invest in.

- work with the Highland Council and its associated companies to help deliver its corporate objectives including the policies and proposals set out in the *Highland-wide Local Development Plan* (adopted 05 April 2012) and the *Inner Moray Firth Local Plan*;
- work with The Highland Council to help deliver the aspirations set out in the "City Vision for Inverness" through the implementation of the *Inverness City Centre Development Brief* (March 2013);
- work with Inverness Business Improvement District (BID) Team to improve the built environment of the city centre;
- work with Inverness's voluntary heritage organisations to help co-ordinate efforts and build capacity;

- promote the role of the historic built environment and its conservation in economic and community regeneration;
- promote opportunities for cultural tourism; and
- promote the enhancement of the public realm.

(4) be open, responsive, transparent, effective and efficient in our work.

- agree a business and action plan with our funding partners to be updated on an annual basis;
- publish our annual report and accounts;
- maintain a strong corporate identity for the company;
- maintain a city centre office space; and
- provide advice and support to the general public on a range of heritage related issues

The individual action points within each of these strategic objectives are fully detailed in the Inverness City Heritage Trust's Action Plan, which should be read in conjunction with this report.

Resources

- Core revenue funding of £50k per annum has been secured from Historic Scotland for five years to meet running costs and £1M capital funding towards the grant scheme for those years of which £946,841 shall be allocated towards grants for the TH scheme on Academy Street. The Highland Council also continues to provide assistance in kind through the provision of office accommodation and related services.
- Funding from other sources could be forthcoming but will rely on the success of building links with supporters and stakeholders. These will often be linked to the local initiatives and priorities of the individual organisations.

SWOT Analysis

Strengths

- Five year revenue funding from Historic Scotland creates security and facilitates strategic planning
- Board of Directors with a broad range of relevant expertise.
- Support from Scottish Ministers and Historic Scotland.
- In kind support from The Highland Council.
- Central office accommodation in the Town House, Inverness.
- Membership of the City Heritage Trust Forum provides for good networking / problem solving / information sharing with the other City Heritage Trusts
- The building repair grants scheme has been very popular with residential property owners (scheme currently suspended until 2017)
- The Trust has been invited to help form a Traditional Buildings Forum for the Highland area
- Potential for greater percentage grant contribution to strategic buildings providing stimulus and potential catalyst to regeneration of surrounding area

Weaknesses

- Property owners in priority areas often lack the necessary capital or will to achieve the conservation aims of the ICHT
- Time constraints associated with a voluntary board of Directors.
- There is a perceived need for succession planning to maintain the breadth of skills within the Board.
- The Trust is dependent on limited staff resources
- The grant awards are market-led
- A narrowing of the eligible area (city centre) and the types of work the Trust can fund will result in prioritisation of projects which may be perceived by some as discrimination and deter owners from carrying out traditional repairs/ conservation work to their properties

Opportunities

- To prioritise projects where the investment in the city's architectural heritage can also facilitate sustainable economic growth.
- Funding from other organisations for specific projects, HLF, AHF etc.
- Work in partnership with The Highland Council to deliver the TH project on Academy Street in Inverness city centre
- Work with the Highland Council and its associated companies to help deliver its corporate objectives including the policies and proposals set out in the *Highland-wide Local Development Plan* (adopted 05 April 2012) and the *Inner Moray Firth Local Plan*;
- Work with The Highland Council to help deliver the aspirations set out in the "City Vision for Inverness" through the implementation of the *Inverness City Centre Development Brief* (March 2013);
- To provide training in good governance for board members.
- To build up a subject based, technical database on local architectural details and on craft skills.

- To build on the established link with Highland Historic Buildings Trust on buildings at risks
- To work in partnership with the Highland Council Development & Infrastructure Service with regard to statutory notices, which may be served on owners of properties within the conservation area.

Threats

- Limited take up of grant aid in the proposed target area and the subsequent knock on effect that this may have in terms of project performance targets. This may be caused by:
 - a) Insufficient local professionals accredited in conservation work
 - b) Lack of traditional craft skills in the local construction industry
- Long lead in times with significant conservation projects.
- Damage to reputation of the Trust due to shift of funded work to Academy Street and the city centre

Monitoring and Review

- Annual Report and accounts will be available in paper hard copy format and on the Inverness City Heritage Trust website
- Annual update of Business Plan and Action Plan will include a review of the progress made.
- The Trust will co-operate with Historic Scotland and The Highland Council in providing information for any future reviews of Trust activities.

Performance Indicators

- The Trust has adopted a number of performance indicators. These will provide a consistent basis for internal evaluation by the Trust and will assist Historic Scotland in their requirement to know what the overall impact of their funding has been in each of the City Heritage Trust areas. The performance indicators are as follows:
 - Annual expenditure
 - Annual expenditure on grants for capital works
 - Management costs as a percentage of annual expenditure
 - Historic Scotland grant as a percentage of annual income and annual expenditure
 - Local Authority grant as a percentage of annual income and annual expenditure
 - Number and total cost of projects supported by the Trust

The Performance indicators for the year 2014/15 were as follows:

- *Annual expenditure*

£498,062 for grants

£49,052 for management/ running of the Trust

Total: £547,114

- *Annual expenditure on grants for capital works*

£498,062 for 2014-15

- *Management costs as a percentage of annual expenditure*

Management costs were 9% of the total annual expenditure

- *Historic Scotland grant as a percentage of annual income and annual expenditure*

The Historic Scotland grant covers 100% of the annual income and annual expenditure

- *Local Authority grant as a percentage of annual income and annual expenditure*

The Highland Council does not give a grant to ICHT in monetary terms; ICHT receives help in kind in the form of office accommodation and related facilities.

- *Number and total cost of projects supported by the Trust*

In 2014/15 the Trust supported 15 projects totalling £498,062. ICHT offers a % grant to owners, the real project costs for these 15 projects was in the region of £963K.

Board of Directors

Inverness City Heritage Trust has ten Directors. Three of the Directors are nominated representatives from The Highland Council; four represent Inverness Chamber of Commerce, Inverness Civic Trust, Inverness Architectural Association and the Inverness Chapter of the Royal Institution of Chartered Surveyors respectively. There are three individual directors.

They are as follows:

James Gray – The Highland Council (Chair)

Occupation: Councillor and Highland Council Convenor
Other Directorships: None
Other affiliations: Chairman of South Area Planning Application Committee.
Inverness Branch Secretary Unite Trade Union

Donnie Kerr– The Highland Council

Occupation: Councillor
Other directorships: Spectrum Centre, Inverness
Other affiliations: Member- Merkinch Community Centre Association

Kenneth MacLeod – The Highland Council

Occupation: Councillor, Solicitor and Chartered Insurance Broker
Other directorships: Kenneth MacLeod Ltd
Isle Martin Trust
MS Therapy Centre Highland Ltd
Other affiliations: Member of the Gaelic Society of Inverness
Committee member – Inverness Civic Trust
Life member of An Comunn Gaidhealach
Honorary life member of the Scottish Judo Federation
Member of the Scottish Liberal Democrats

Jean Ramsay Smith – Board Director, Inverness Chamber of Commerce

Occupation: Branding Consultant, JRS Marketing Associates
Other directorships: Director of Inverness Chamber of Commerce
Other affiliations: Past President of Inverness Chamber of Commerce

Bryan Longmore – Inverness Civic Trust

Occupation: Retired Solicitor
Other directorships: None
Other affiliations: Past Chair of Inverness Civic Trust

James Alexander – Inverness Architectural Association

Occupation: Retired architect
Other directorships: Director of Scotland's Housing Expo-Highland Housing Fair
Other affiliations: Retired Member of the Royal Institute of British Architects (RIBA)
Retired Fellow of the Royal Incorporation of Architects in Scotland (FRIAS(Rtd))
Member of the Committee on Church Art & Architecture
Past president of the Inverness Architectural Association

Graeme Taylor – Royal Institution of Chartered Surveyors

Occupation: Chartered Surveyor
Other directorships: None
Other affiliations: Member of the Royal Institution of Chartered Surveyors

David Henderson – Individual

Occupation: Economist
Retired executive with Highlands & Islands Enterprise
Retired Local Councillor
Other directorships: None
Other affiliations: None

Ian Sutherland McCook – Individual

Occupation: Chartered Architect and Property Developer
Other directorships: Director of Assay Developments Ltd
Director of Main McCook Architects
Other affiliations: Member of Inverness Chamber of Commerce
Member of Centre for Alternative Technology
Associate member of RIAS
Trustee of Moray Steiner School

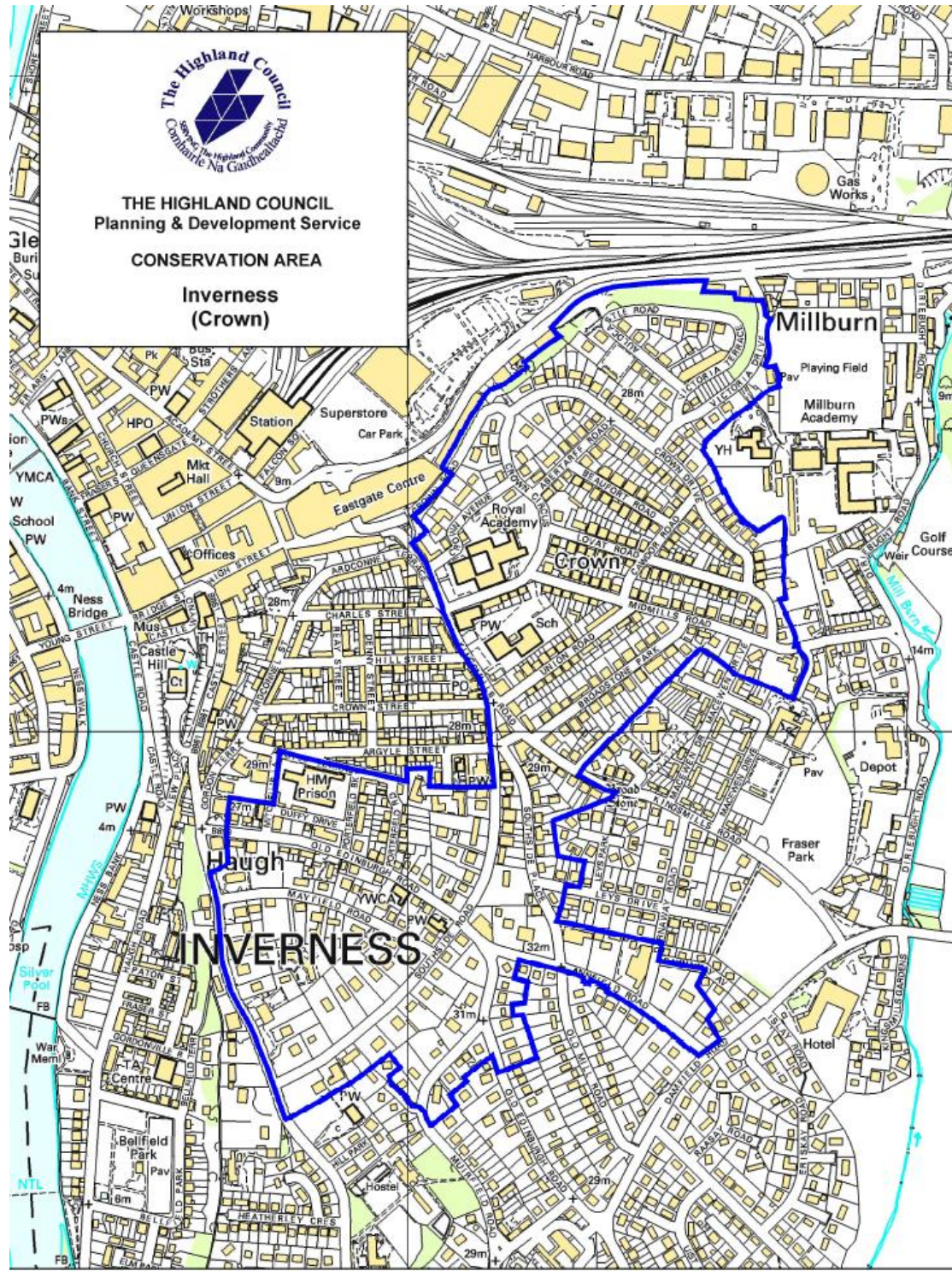
John Duncan – Individual

Occupation: Retired Local Authority Conservation Architect
Other directorships: Highland Historic Buildings Trust (Chairman)
Other affiliations: Retired Fellow of the Royal Incorporation of Architects in Scotland (FRIAS(Rtd))
(Past President of Inverness Architectural Association)
Full Member of the Institute of Historic Building Conservation (IHBC)
Chair of the National Trust for Scotland Highlands and Islands Regional Group
Advisor to the Scottish Churches Trust

Alison Tanner – Inverness City Heritage Trust Project Officer

Alison has worked in the field of building conservation since the completion of an MSc course in European Urban Conservation in 1997. Since then she has worked for Glasgow Conservation Trust West, for Scottish Borders Council where she worked as the Assistant Conservation officer within the planning department, and from 2001-04 as the Assistant Director of Glasgow Building Preservation Trust where she was responsible for the project funding & management of several high profile conservation projects in the Glasgow area as well as the organisation of the Glasgow Doors Open Day event. In February 2004, she was appointed to set up and run the Inverness City Heritage Trust. Alison is a full member of the Institute of Historic Building Conservation (IHBC).

Appendix A – Map of the conservation areas

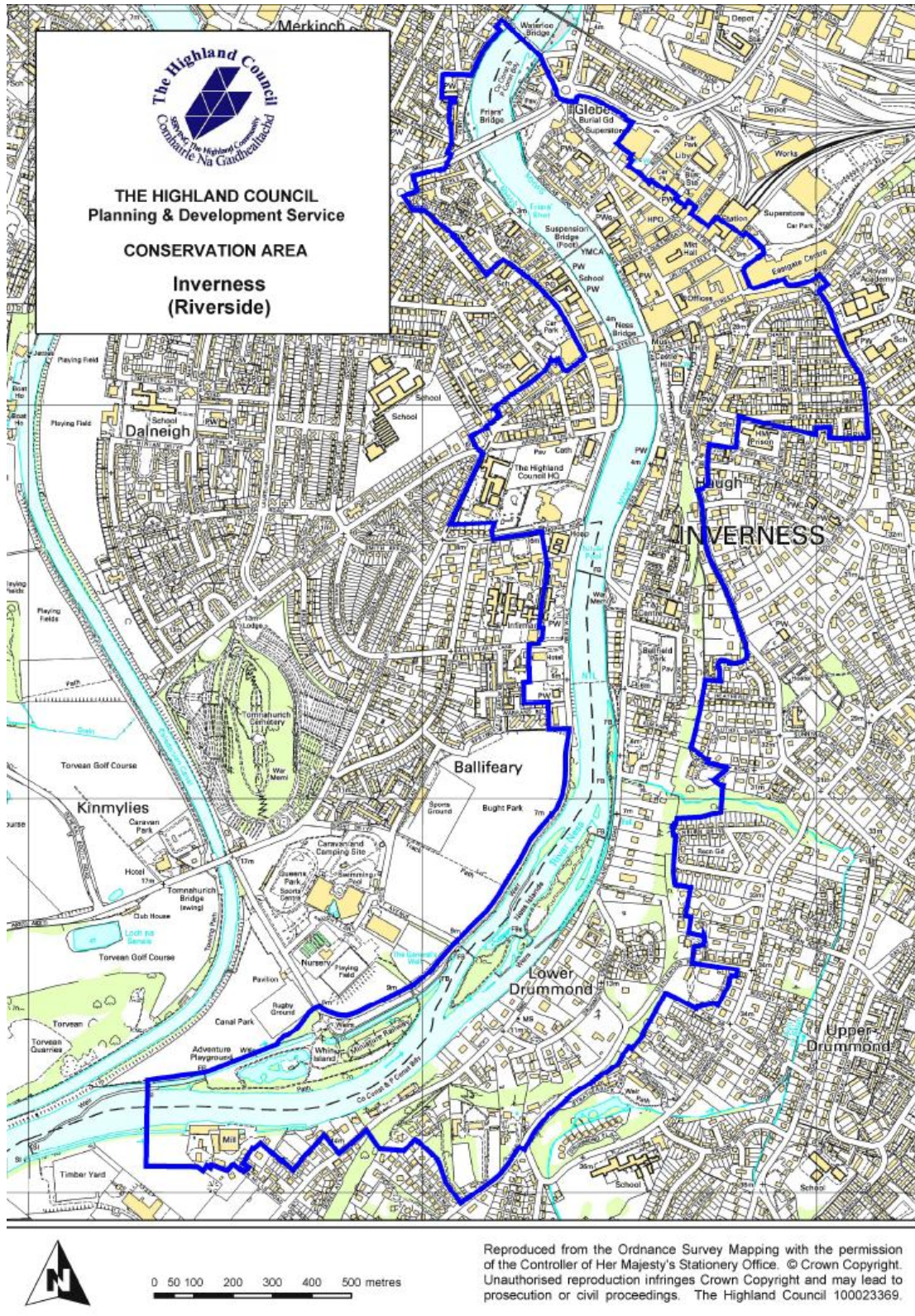



THE HIGHLAND COUNCIL
 Planning & Development Service
CONSERVATION AREA
Inverness
(Crown)

Reproduced from the Ordnance Survey Mapping with the permission of the Controller of Her Majesty's Stationery Office. © Crown Copyright. Unauthorised reproduction infringes Crown Copyright and may lead to prosecution or civil proceedings. The Highland Council 100023369.



0 50 100 200 300 400 metres



The Highland Council
 Comhairle na Gàidhealtachd

THE HIGHLAND COUNCIL
 Planning & Development Service

CONSERVATION AREA

Inverness
 (Riverside)

Reproduced from the Ordnance Survey Mapping with the permission of the Controller of Her Majesty's Stationery Office. © Crown Copyright. Unauthorised reproduction infringes Crown Copyright and may lead to prosecution or civil proceedings. The Highland Council 100023369.